



Reaching Fragmented Audiences

FOR ADVERTISERS NAVIGATING TODAY'S MULTISCREEN ECOSYSTEM



Reaching fragmented audiences

In today's multiscreen ecosystem, audiences have endless opportunities to engage with content across an ever-growing selection of platforms and devices. For advertisers, however, this massive expansion of viewing options has led to a fragmented environment. So, how can you capture these scattered audiences? And where does the industry go from here?

Effectv conducted a consumer survey of more than 1,700 U.S. adults to determine precisely how people watch video content. The results not only highlighted the effects of fragmentation but also illuminated several areas of opportunity for advertisers.

How audiences watch content

Audiences watch video content across multiple TV networks, streaming platforms, and devices. In fact, **multiscreen campaigns can reach audiences through 4,000+ unique device and publisher combinations.**² Let's take a look at exactly how people watch.

The TV Screen

Even with so many device options, **87% of consumers said they most commonly watch content on the TV.**¹ The data supports this, as **81% of streaming impressions are still delivered on the TV screen.**²

The TV is the largest, most engaging screen in the household and positively impacts outcomes for advertisers. Compared to a mobile environment, **ads on the TV screen lead 2.2X higher recall and 1.3X higher purchase intent.**⁴

Viewers simply prefer watching content on a bigger screen. Moreover, multiscreen Effectv campaigns have a higher reach through the TV screen than any single streaming service. This is good news for advertisers as research shows that TV is a brand legitimzer, awareness generator, and message amplifier.⁴



Streaming

Streaming quick facts among consumers¹

95% | streamed content in the past year.

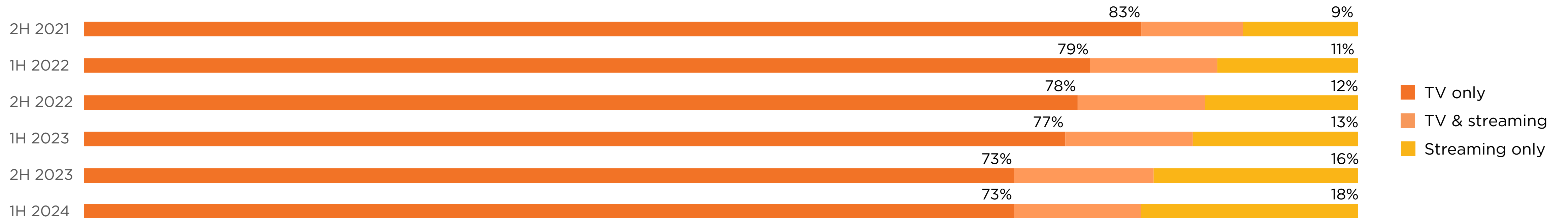
49% | cited the desire to “watch exclusive/original content” as their top reason for adding a new streaming service.

81% | watch at least two streaming services per week.

31% | are subscribed to 4+ streaming services, while most (56%) have two to four.

A recent analysis of multiscreen advertising campaigns shows that traditional TV advertising continues to be a strong foundation for multiscreen campaigns. However, there has also been a steady shift in unique reach toward streaming. Nearly 1 in 5 households reached are unique to streaming.²

Share of reach over time²



What this means to advertisers

Traditional TV and streaming are better together. Taking a holistic approach to advertising creates the greatest opportunity for maximizing reach.

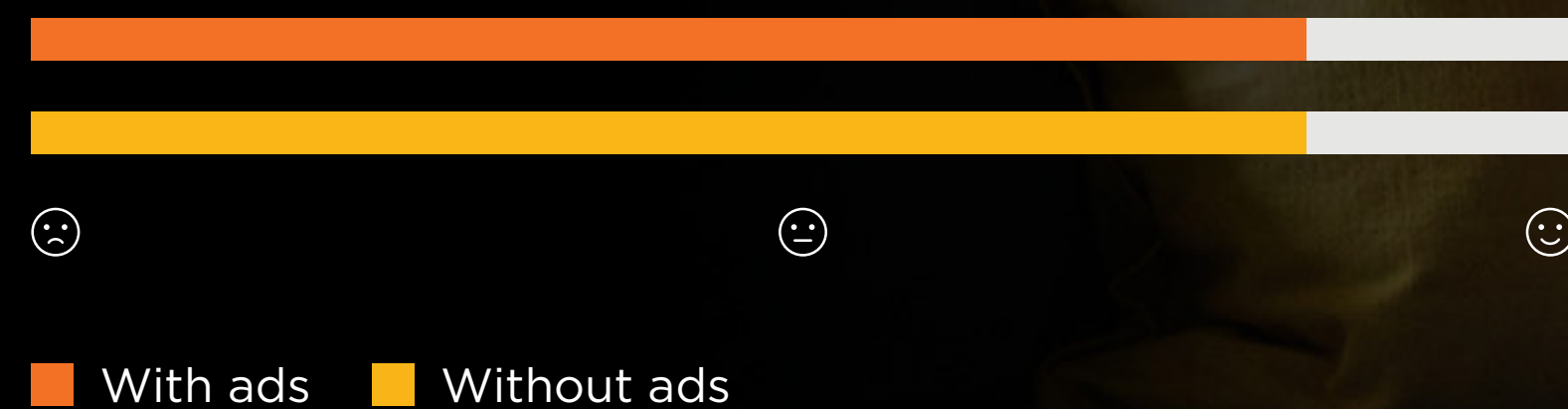
Viewers don't mind ads...

When asked how they felt about ad-supported content:¹

84% of respondents said they are OK with ads in exchange for free content, an increase from 2021.

61% of respondents were likely or very likely to watch ads for a discounted monthly cost.

How viewers rate content with and without ads⁵



What this means to advertisers

According to a recent research study, viewers found a program with ads leads to the same enjoyment as a program without ads.

...but they do have preferences

When asked about the type of ad they are most likely to pay attention to:¹

71% | of respondents said, "The ad is for a product I need or want."

53% | said, "The ad is from a local business."

When asked about the type of ad that bothers them:¹

78% | said ads that are slow or buffer when viewed

71% | said ads that unnaturally interrupt content

Viewers said they trusted ads most when they came from:¹



A local business



A business offering a sale or discount



A brand they recognize

What this means to advertisers

Viewers are open to ads, but they must be relevant and delivered in a high-quality viewing experience.





How to reach fragmented audiences

With audiences watching content across multiple streaming services and TV networks, a **multiscreen approach is a must**. However, there are more strategies advertisers can employ to capture unique audiences and expand a campaign's reach.

Consider addressable advertising

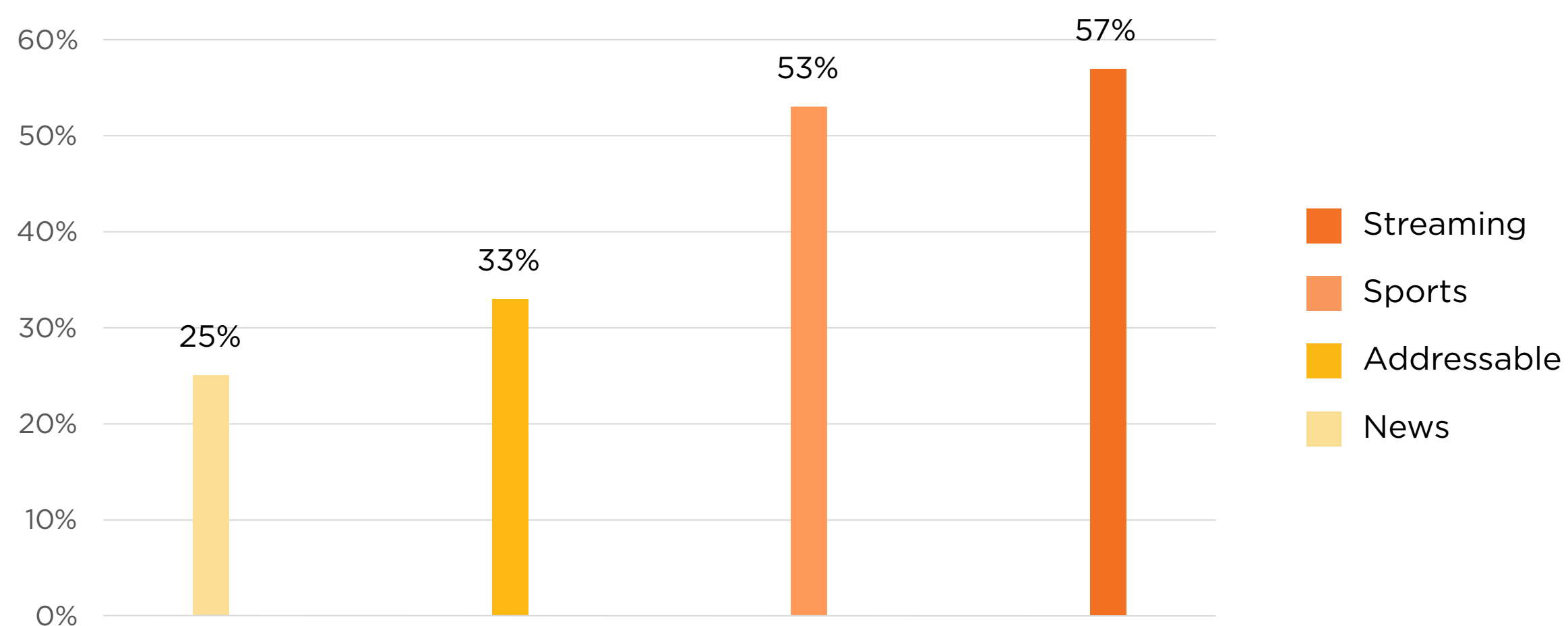
Addressable advertising allows advertisers to deliver personalized messaging directly to households across any screen. This granularity allows advertisers to be efficient with their investment by targeting their most likely customers. Addressable advertising also adds incremental reach. **Over 1 in 3 households reached by addressable are only reached by addressable.**⁶

Focus on sports & news

A recent analysis of multiscreen advertising campaigns found that high-value programming like sports and news provide an opportunity to combine reach, scale, and distinctive audiences. In fact, **53% of households reached by sports are only reached by sports.**⁷ Likewise, **a quarter of total households reached were unique to news**, bringing in households that may have otherwise been inaccessible.

53% | of households reached by sports are only reached by sports.⁷ **25%** | of total households reached were unique to news.

% of households reached by tactic that was unique to the tactic*



**How to read this chart*

57% | of households reached by streaming were only reached by streaming





Don't forget light TV viewers

The number of light TV viewers is growing. Today, **more than 29% of adults are considered light TV viewers (watching less than two hours of TV per day), an increase from 25% in 2012.**⁸ Many strategies focus on heavy TV viewers who watch more than four hours of TV per day but downplay those who watch less than two hours per day. However, as these viewers take up a larger share of the market, their importance will only grow.

Our survey results also show that light TV viewers tend to be higher-income and newer to the market. Consumers generally only consider a few brands when making purchasing decisions. So, reaching this light TV audience when they are new to market and have extra money to spend could significantly impact brand loyalty, securing valuable lifelong customers for your business.

What this means to advertisers

To reach these households, combine a data-driven TV campaign with strategies that offer high incremental reach, such as addressable and streaming advertising.



Embracing fragmentation

Ultimately, the best strategy to deal with fragmentation is to embrace it. By catering to a multiscreen environment, prioritizing strategies with incremental reach, and going after light TV audiences, advertisers can not only survive but thrive.

Effectv is uniquely positioned to overcome fragmentation by offering solutions that bridge platforms and providers. Effectv can deliver messages directly to your unique audience across all screens and devices. **Contact us to learn more about how you can level up your advertising and embrace fragmentation.**

Sources

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4. Comcast Advertising and MediaScience study. TV Makes Memories. 2022.
5. Freewheel's Viewer Experience Lab: Quality Ad Experience. Published June 2024.
6. Comcast Internal Analysis of Ad Exposure data from advertiser Addressable & data-driven TV campaigns (n=72), Nov. 2022-Mar. 2023. Campaigns with between 10-80% of impressions in addressable included in analysis.
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8. Nielsen. "Understanding how campaign optimization pays off in an ever-expanding media landscape" 2022. <https://www.nielsen.com/insights/2022/understanding-how-campaign-optimization-pays-off-in-an-ever-expanding-media-landscape/>

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